Sort & Search Tool Help

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WHAT YOU CAN DO WITH THIS TOOL:

- 1. **Sort** on any of the list headings, for example Document Number, Division, Title etc.
- 2. Search on **Division or Bureau** (whatever the option)
- 3. Search on **Document Number**
- 4. Search by **Date**
- 5. Perform refined searches (subset searches) that combine multiple searches
- 6. **Sort** on any search results

GENERAL SEARCH RULES:

- 1. Do NOT use the browser's back button when performing searches.

 Instead use the programs "Back To Home Page" button or the programs "Search Documents" button to return to the search box
- 2. Only one search item can be specified at a time. A search by Number is one search. A search by Title is one search. A search by Division is one search. If you try to enter multiple search criteria such as a document number, a title and a division then you are trying to do 3 searches at once. This incorrect technique will result in a pop-up error message.
- 3. The search looks for "strings" of letters or characters not complete words. A string of letters means the search criteria (string) you entered in one of the search fields must appear together (just like you typed it) somewhere in the actual data. This provides lots of flexibility if you are not sure how the data appears in a record. A hint: sometimes less is better.

(Example: phone will bring back phone and telephone. But telephone will not bring back phone.)

4. Use the singular versus plural of a word. The singular will bring back both singular and the plural occurrences. Whereas, the plural will only bring back the plural.

(Example: use business card NOT business cards for your search criteria).

5. You must RESET in between searches or you will be searching the data returned on the first search.

(Example: A search on ASD must be RESET before you search again on another division, such as DVR, or you will be searching DVR documents within ASD documents.)

6. You can always refine your search results by performing a search within the results returned from the previous search (subset search).

(Example of a subset search: Search on ASD and then return to the search box, DO NOT RESET the search, instead enter the word disability in the title field, click search again. The result is that you have searched ASD documents for any that contain the word "disability" in the title).

7. Date searches require that you choose one of the "radio button" options along with entering the date in the date field.

Your choices are:

- 1. Equal
- 2. Greater or Equal
- 3. Less or Equal
- **8.** To **SORT** a list of documents, simply click on the column heading that you want to sort the data by.

(For example, you can sort by division, or title or date etc. any column heading can be used to sort the data.)

HOW TO USE THE SORT & SEARCH TOOL:

The opening screen of the search program shows the Search Box and recently updated documents displayed in the gray box on the right.

This search (is really a **sort**) which would mimic what everyone has been use to in the past – viewing documents by Document Number, Document Title or the Division (or bureau whatever the option) that owns the document.

A. To view a list of all the documents, click on the first link in the search box that is labeled "Click to View all Documents" (that link is highlighted in black in this screen print).

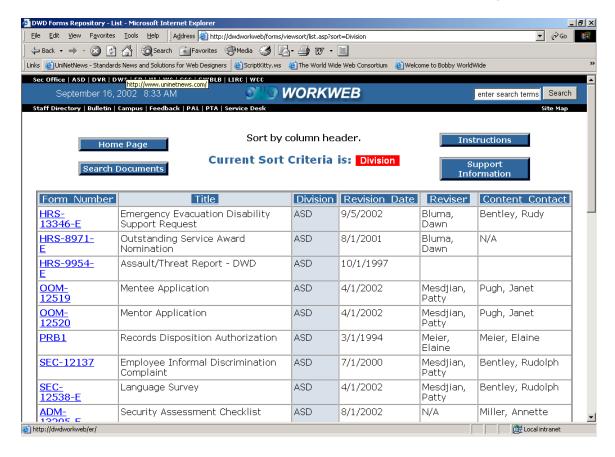
Click for <u>Search Help!</u>	Search Now Reset Search	
Search Options:	Enter Search Criteria	
View List of All Documents	Click to View All Documents	
Document Number		
Document Title		
Document Subjects		
Document Category	AA/EEO Administrator's Office Automobiles	
Bureau	Administrator's Office Budget & Planning Facilities	
Revision Date mm-dd-yyyy	© Equal © After or Equal © Before or Equal	

The default SORT is by Document Number, as shown below:

B. You can also sort by Title or Division (or bureau whatever the option), just like before, by clicking on the column heading by which you would like to sort. You now have the ability to sort by any of the column heading criteria, not just Number, Title or Division!

Document Number	Title	Subjects	Category	Bureau/Division	Revision Date	Contact
100	Test Entry	test	Legal	Finance	10/15/2002	Hunt, Jan
<u>101</u>	Secretary's Commendations	Commendation, Recognition, Certificates	Dept Policy	Secretary's Office	8/1/1991	Jacquie Piraino
102	Photo ID Cards	Identification, State ID, Deputy Authorization	Dept Policy	General Services	7/9/2002	Vinz, Eric
104	Personal Opinions	Lobbying, Public Communications, Legislative Relations, Legal	Legal	Secretary's Office	3/22/2002	Bernstein, Howard
<u>105</u>	Lobbying	legislators, staff, legislative committees,Public Communications	Legal	Secretary's Office	8/1/1991	Bernstein, Howard
<u>106</u>	Communications Policy	Reporting, News Media, Legislature, Reporters	Dept Policy	Secretary's Office	7/1/2002	Langenohl, Rachel
<u>107</u>	Deputy Authorization on State Photo ID Cards	Photo ID Cards, State Identification,State ID,	Dept Policy	General Services	7/9/2002	Miller, Annette
108	Legislative Relations	Legislative	Dept Policy	Secretary's Office	3/5/2001	Markham,

The screen-print below shows a sort by Division. Simply click the column heading "Division". You can sort on any one of the column headings.

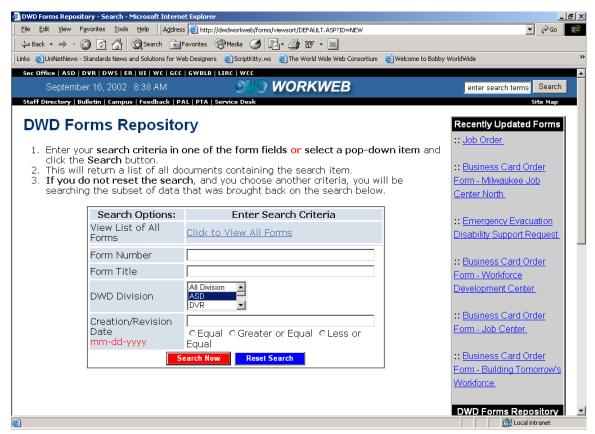


2. SEARCH by DIVISION

A. To perform a Search by Division, choose the division you are interested in from the drop-down division list. Click search. Only the documents that pertain to that division will be returned to you.

*If you would like a **shortcut on your desktop**, that when clicked would only bring back documents for your division, please contact Jan Hunt at <u>jan.hunt@dwd.state.wi.us</u> or call me at 608-261-2143.

In the screen print below, ASD has been picked from the drop-down list of DWD Divisions.

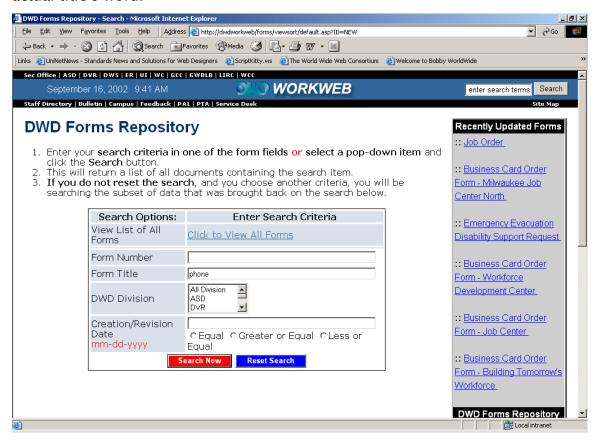


Click search and all of ASDs documents, and only ASDs documents will be returned.

3. SEARCH by TITLE

A. Enter a word or words that you believe will be in the title of the document(s) you are looking for. Remember general rule #3 – sometimes less is better. For example, searching for telephone request related documents using the search word "phone" would bring back a more complete list of documents. Not only with this search find any titles with the word phone in it, but also the documents with the word "telephone" in the title. That is because "phone" is a string found within the word "telephone". You will also get back results for "cellular phones".

Do not use the plural of the search words always use the singular. In our example above, using telephones or phones will NOT bring back any document with the singular of the word, because the S is missing in the actual title's word.



Searches on document title might be best done as a subset search.

Subset Search:

In this example we are looking for the training evaluation form but we are not sure of the title. So, we will "go with less" and enter only the word TRAIN. This will bring back any documents with train, training, trainer etc. in the title field. (Entering training will NOT bring back train or trainer because training is not a complete part of those other words, where as train is.)

- 1. **Enter TRAIN** in the Title field (click search) to bring back all the documents with TRAIN and it's variations, in the title. We will pretend that there are many returned documents so that we can **perform a Subset Search** on the results.
- 2. **Return to the Search Box** and now enter **EVALUATION** in the document title field. **Do NOT reset the search**.

To return to the Search Box: click the **programs Search Documents** button or the programs Home Page. DO NOT use the back button on the browser.

Home Page	Sort by column header.	
Search Documents	Search: Title contains train Current Sort Criteria is: Form Number	Instructions Support Information
Reset Search		Information

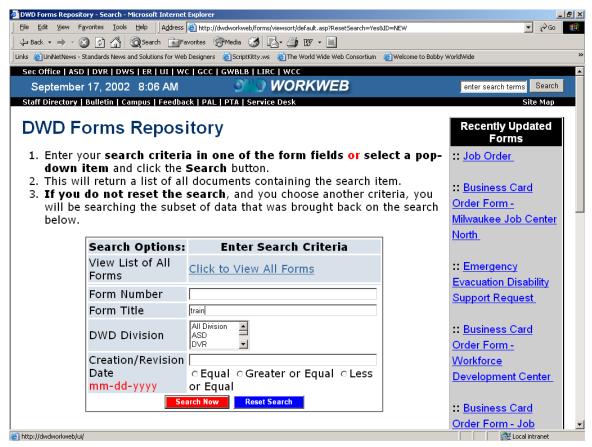
When you are back at the Search Box, the very top of the screen will let you know what the current search criteria is set to (in our example the text says, "Title contains TRAIN").

DWD Forms Repository				
Your Current Se Title contains tra				
If you want a completely new search, remember to click the RESET button (or choose the New Search radio button below), or you will be searching a subset of the previous search (criteria shown above).				
		New Search ⓒ AND COR		
	Search Options:	Enter Search Criteria		

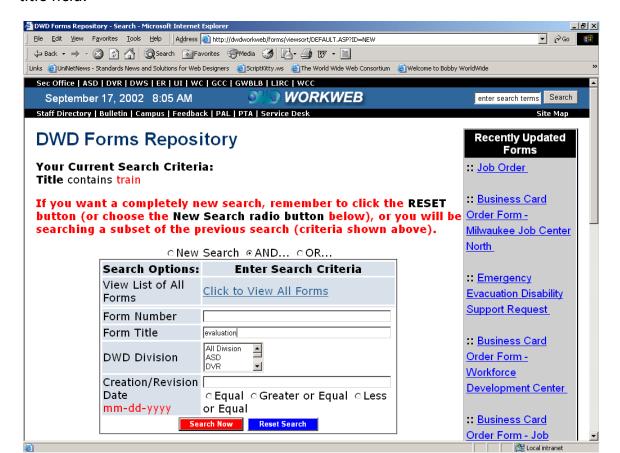
There will also be a red alert message that explains that if you want a new search you need to click the reset button. **DO NOT RESET in**between searches if you want to perform a subset search. In our search for the training evaluation document, for the second part of the subset search we enter the word EVALUATION in the Title field.

3. Click search and you will get back all documents that contain the words train, training, trainer and evaluation. The search criteria listed at the top of the screen will say "Title contains train and Title contains evaluation".

The screen-print below shows the entry of TRAIN in the title field.



Followed by the screen-print for the subset search using EVALUATION in the title field.



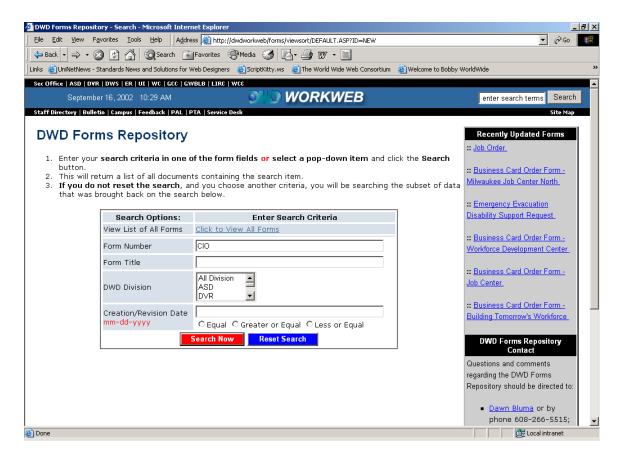
A. Enter whatever portion of the document number that you know, or even the entire documents number if you know that. But remember the search is based on strings so if the form is CIO-13150-E and you enter CIO 13150 E for the search criteria, you will not get back the results you expected. That is because, the "string of data" that makes up the form number in the database includes the dashes. Searches on document number might be best done as a subset search.

Subset Search:

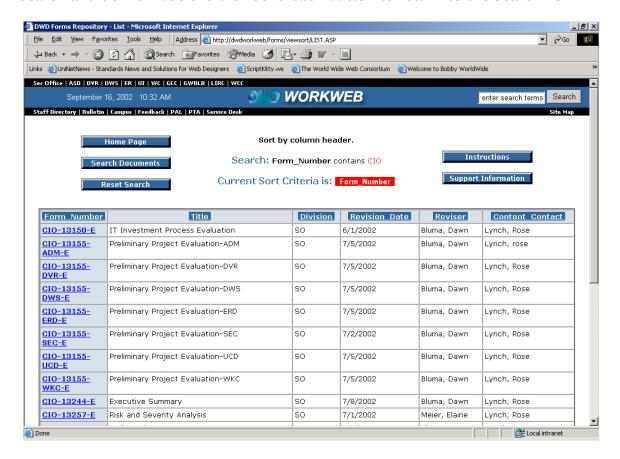
Enter CIO in the Document Number field (click search) to bring back all the CIO forms, then perform a Subset Search on those results by returning to the search box (do NOT reset the search) and now enter 13150 in the Document Number field. Click search and you will get back all documents that contain the number 13150.

If you do not know the entire number, but think the number started with or contained 131, you could have entered that portion of the number as your second search criteria. The search would bring back the document you were looking for, and possibly extraneous documents that are CIO with 131 in the number – such as CIO–13155. You can now scan the returned list for the specific document you are looking for.

Below is the screen print of the first search in our subset search looking for the CIO-13150-E form. **The search criterion of CIO** was entered in the Form **Number field**. Click search and all the forms containing CIO will be displayed.

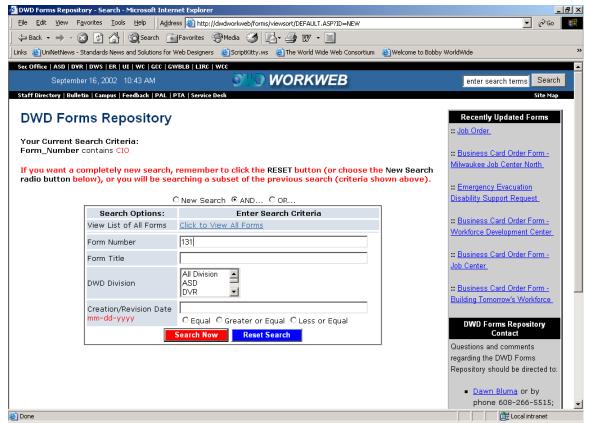


Below are the returned results for the search criteria of CIO in the number field. To perform a Subset Search, click the program button Search Documents or the program button Home Page to return to the Search Box. DO NOT RESET the search and do NOT use the browser's back button to return to the Search Box.



When you are back at the Search Box, the very top of the screen will let you know what the current search criteria is set to (in our example case it says, "Form Number contains CIO").

There will also be a red alert message that explains that if you want a new search you need to click the reset button. **DO NOT RESET in between searches if you want to perform a subset search.** In our search for the CIO-13150 document, we will now enter in the Document **Number** field 131 (pretending we don't know the entire number, or you would do this if you wanted all the 131 documents back.)



Click search and the result will be a displayed list of all documents with CIO 131 in the title. You can continue doing subset searches until you have refined your search to the documents you want to work with.

Subset Search Summary of Steps:

- 1. Search on one criterion by entering a search word in a text field **OR** choosing a selection from a drop-down list.
- 2. Return to the Search Box to search on your second criteria.

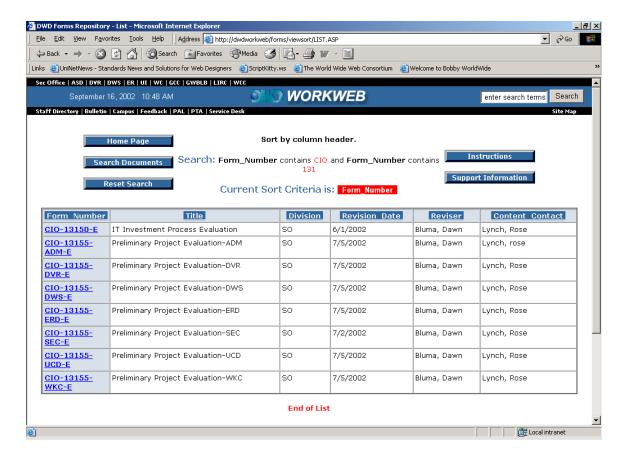
 Do not use the browser's back button and do not reset the search!

 To return to the Search Box: click on the program's Search Documents button or the program's Home Page button.



3. Continue performing subset searches to further refine your results.

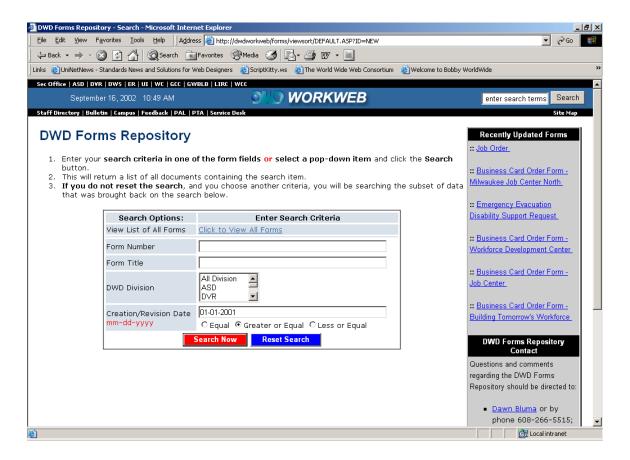
And here are the results for the **subset search that** started with a search for CIO followed by a second (subset) search using 131, in the document title.



5. SEARCH on DATE

- A. Date searches are easy, except you must remember to choose one of the 3 available options:
 - 1. Equal
 - 2. Greater or Equal
 - 3. Less or Equal

Enter your date; choose the applicable option and click search. Date searches can also be used in subset searches. Actually any field can be used in a subset search.



This example shows the date of 01-01-2001 and the option chosen is the middle one, Greater or Less, which will bring back any documents created or revised on or since 01-01-2001.

Please, if you have any questions or would like one-on-one training, email Jan.hunt@dwd.state.wi.us or phone Jan at 608-261-5829.